

# The Cataloguing Code of Ethics since 2021

## What next for your Code?

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### ABSTRACT

This article provides an update on the Cataloguing Code of Ethics since its publication in 2021. It details the Cataloguing Ethics Steering Committees' (CESC) work in promoting the document and mentions community use. The Committee's aspirations and plans for the document during 2025 are outlined and the article concludes with the authors' personal observations regarding how the Code might evolve.

**KEYWORDS** cataloguing ethics

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### Introduction

In January 2021 the Cataloguing Code of Ethics<sup>1</sup> was published by the Cataloguing Ethics Steering Committee (CESC)<sup>2</sup>.

This followed a 2-year open and inclusive project involving written submissions from 74 volunteers in six working groups drawn from the international cataloguing community of practice, plus feedback provided from the wider community on the two draft versions of the document.

The Code was created for and by the cataloguing community of practice; and it addresses the particular and unique responsibilities of anyone who creates, shares, enriches or preserves metadata – regardless of the sector that they work in or the standards that they use.

Most importantly it reaffirms our commitment to doing this work for all sectors of our societies - not just those groups that have traditionally or historically seen themselves reflected in our published output and inevitably in our collections.

<sup>1</sup> [https://docs.google.com/document/d/1IBz7nXQPfr3U1P6Xiar9cLakzoNX\\_P9fq7eHvzfSIZ0](https://docs.google.com/document/d/1IBz7nXQPfr3U1P6Xiar9cLakzoNX_P9fq7eHvzfSIZ0)

<sup>2</sup> <https://sites.google.com/view/cataloging-ethics/home>

## The Code since 2021 – Endorsement by our professional organisations

For the CESC the Codes' publication marked the beginning of an advocacy journey that we are still embarked upon today.

Our first task was to seek endorsement for the Code from our 3 sponsoring professional organisations, as the document was always intended to complement their ethical guidance.

Endorsement came first from the American Library Association in October 2021; followed by CILIP in March 2022 - the Code was subsequently added to the CILIP Ethics Hub ([CILIP, no date](#)); and finally, by CFLA-FCAB (Canada) in October 2024.

### Advocacy for the Code in the UK

But even as our representations were under consideration in the UK, USA and Canada we engaged with as many groups as possible to promote the Code, not only to cataloguers, but also to the wider information profession.

A timeline of the CESC advocacy activities can be found on the CESC website page Steering Committee Updates<sup>3</sup> which includes presentations slides with additional links to some presentation recordings<sup>4</sup> but here is a selection of our advocacy work.

In the UK between 2021-2023 there were informal meetings or conference presentations/workshops for CILIP and its LGBTQ+, Rare Books and Special Collections, International Librarians, and Metadata and Discovery special interest groups as well as for The Collections Trust, ARLIS Cataloguing and Classification Committee and the Critical Approaches to Libraries Conference (CALC).

Also, during 2023 the Code was translated into Welsh and was cited in the National Library of Wales (2023) (Draft) Collections Description Policy ([Llyfrgell Genedlaethol Cymru, The National Library of Wales, 2023](#)); and workshops on the practical use of the Code were delivered to the WHELF Metadata Group and to curatorial and documentation staff at the National Museum of Wales.

In Scotland there was a presentation to the SCURL EDI Network in 2023 and there is a proposal to translate the Code into Gaelic scheduled for discussion at the CILIP Scotland Board of Trustees meeting in April.

In December 2024, to promote the Code to more partners in the wider metadata ecosystem, it was shared with an audience comprising librarians, publishers and content, systems and metadata vendors at the UKSG Forum in Birmingham ([Daniels, 2024](#)).

<sup>3</sup> <https://sites.google.com/view/cataloging-ethics/home/updates>

<sup>4</sup> <https://sites.google.com/view/cataloging-ethics/presentation-recordings>

We hope that this UK-based advocacy has shown the value of using the Code and we are grateful for any public institutional endorsement such as that contained in the cataloguing section of the London School of Economics Library Collections Policy ([The London School of Economics and Political Science. Library, 2023](#)).

The Code has also been used by Andrew McAinsh and his team at the University of Strathclyde during a project to update the library's locally devised and managed subject headings for children's literature, an experience shared at a CILIP Scotland Metadata and Discovery Group online event (Bite No. 7) in January ([McAinsh, 2025](#)) [*Editors note: a write up of this project is also included in this issue of C&I*]. Not mentioned at the event, but confirmed in subsequent correspondence, was the use of the Code to obtain management endorsement for a name change requests policy in 2024.

### **Advocacy for the Code in North America**

In the USA, where the idea of the Code was conceived, we are fortunate to have eminent and active library educators and practitioners involved in continuing advocacy for the Codes' adoption and use.

Yon and Willey used the Code to retrospectively analyse a cataloguing project undertaken before 2021 concluding that

'It was initially tempting to view the code as a checklist of things the authors did well, and not undertake further consideration; however, the introspection became more valuable when they viewed the code as a guide to thinking about ways in which the project succeeded and could have been improved. This helped the authors become aware of opportunities for future research, potential retrospective projects, and where their ethical practice in everyday work can be improved. While the general nature of the code can be seen as lacking specificity, it also encourages deeper engagement with cataloging work.' ([Yon and Willey, 2021, p. 129](#))

In 2024 CESC Co-chairs Karen Snow and Beth Shoemaker re-ran a 2019 survey originally created to gauge practitioner ethical perspectives. Amongst other things respondents were asked to define cataloguing ethics and it will be interesting to note whether the 2024 survey responses reference the Code to answer this question.

In Canada, CESC Canadian representative May Chan worked with her colleagues in the Canadian Federation of Library Associations (CFLA-FCAB) Cataloguing and Metadata Standards Committee (CMSC) to seek endorsement for the Code.

The Cataloguing Code of Ethics Review Working Group (CCERWG) presented a report to the Federation in 2024 ([Cataloguing Code of Ethics Review Working Group, 2023](#)). This document informed the decision by CFLA-FCAB to formerly endorse the Code but also made some important observations and recommendations regarding next steps.

The consultation established that there was overwhelming support from the participants for the Code to be endorsed (84% for, 14% against). However, the working group recommended ([Cataloguing Code of Ethics Review Working Group, 2023](#), pp. 9-10) further analysis of the reasons that were cited for non-adoption e.g. a perceived lack of inclusivity in the Codes' language; the doubts of First Nations respondents regarding the Codes' ability to reflect their culture and indigenous ways of knowing; and the lack of resources at local, provincial and national levels to practically implement the Code equitably across the Canadian library sector.

### **International Advocacy for the Code**

The Code has also garnered the attention and interest of our wider international community of practice and this is evidenced by a number of community-supplied translations of the Code into Greek ([Chantavaridou, 2023](#)), Arabic ([Zakaria, no date](#)), Welsh ([Llyfrgell Genedlaethol Cymru, The National Library of Wales, no date](#)), French ([Canadian Federation of Library Associations, no date](#)) and Bosnian ([Mirović, 2024 b](#)). All of these can be accessed via the CESC website.

Additionally partial translations i.e. of the Codes' Statements of Ethical Principles have been produced by colleagues in South Africa, who translated the Statements into 8 of the 12 official languages.

We believe that these translations will equip our international workforce to consider whether the Code reflects their particular cultural values, histories and societies; and hopefully encourage participation in the revision and reframing of the next iteration.

Contact from and with the New Zealand and Australia cataloguing special interest groups during 2022 resulted in a presentation to LIANZA CAT SIG ([LIANZA, 2022](#); [Snow and Shoemaker, 2022](#)); and in the Code being added to the ALIA ACORD cataloguing resources web page ([ALIA Community on Resource Description, 2022](#)). Additionally, preliminary feedback from colleagues in Australia in 2024 indicated that whilst there was strong support for the Code in principle there was concern that it did not adequately reference First Nations Australians history and culture. It was requested that the particular cataloguing issues of First Nation and Indigenous communities globally be included in any future versions of the Code.

Moving North, CESC presented to the South African cataloguing special interest group, LIASA IGBIS in 2023 and provided a follow up article for their newsletter. The response to the presentation was truly humbling as our colleagues immediately decided to survey their workforce regarding the suitability of the Codes' Statements of Ethical Principles to the South African context. As already mentioned, the Statements were translated to facilitate this exercise and the initial analysis was presented by Tienie de Klerk at the LIASA conference later that year ([De Klerk, 2023](#)). There were some interesting parallels with colleagues in Canada regarding the language used in

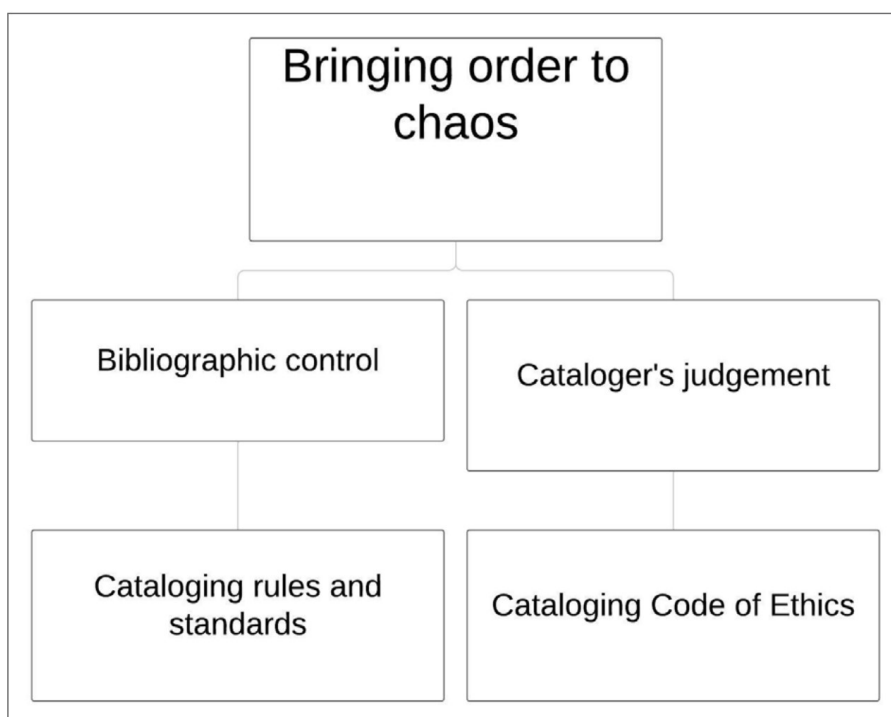
the Code and the perceived lack of resources to equitably apply the Codes principles across diverse institutions.

A final report detailing the findings and recommendations is being considered by IGBIS and should be available during 2025.

2023 also saw the Code translated into Greek ([Chantavaridou, 2023](#)) and an invitation to CESC to present from the University of Macedonia Library. This online event was very well attended with over 200 colleagues joining for the presentation and Q&A ([pamaklib, 2023](#)).

During 2024 the Code was translated into Bosnian by Dalila Mirović ([Mirović, 2024 b](#)), who also facilitated a presentation to the Department of Information Sciences and the Library of the University of Sarajevo.

Dalila subsequently wrote an article, which includes a diagram ([Mirović, 2024 a](#)) depicting the Codes importance as a tool to inform Cataloguer's judgement. When used in conjunction with our professional standards and rules cataloguers can describe and organise knowledge.



**Figure 1:** Diagram of the process of bringing order to chaos, with the documents that regulate or should regulate it ([Mirović, 2024 a](#), p. 103)

Bringing our advocacy activities up-to-date, in February 2025 the Code was shared with colleagues at the Library Association of Ireland Metadata Groups' AGM in Dublin and there will also be a presentation to the Archives & Records Association conference in Bristol in August.

## The Codes' Use in Library and Information Science Education

No review of the Codes' impact and use so far would be complete without acknowledging the support from the people involved in educating our workforce.

CESC members Dr Karen Snow, Sarah Furger, May Chan, Beth Shoemaker and Dr Diane McAdie have used the Code in their Library and Information Studies teaching.

An article ([McAdie et al, 2023](#)) based on a panel discussion at the Annual Meeting of the Association for Information Science & Technology explained how the Code had been a product of both practitioner input and research activity and advocated for more evidence-based cataloguing ethics practice.

During the same year Dr David McMenemy included the Code in Module 6 The Ethics of Information Organisation of the CILIP Scotland sponsored REVEAL (Reinforcing Ethics and Values for Effective Advocacy for Libraries) resource ([McMenemy, 2023; CILIP Scotland, 2023](#)).

### Where next for the Code?

Now that the Code has been endorsed by CFLA-CFAB, the CESC's intention is to present the document to the International Federation of Library Associations IFLA Cataloging Section<sup>5</sup> with a request that it is used to seed discussions regarding the creation of a truly international Cataloguing Code of Ethics.

We believe that IFLA is the natural home of the Code because the ethical issues embodied in the document are of common interest and concern for cataloguers and metadata managers across the world.

We hope that IFLA will use its network of international cataloguing communities of practice – particularly those where English is not a first language – to bring the Code to a wider audience and timetable the document's regular review so that it can evolve in response to our collective needs.

One possible immediate use for the Code could be the updating of an existing IFLA document: the IFLA Statement of International Cataloguing Principles (ICP) ([IFLA Cataloguing Section, 2017](#)).

An article by Zafalon and Oliveira da Silva in the December 2024 IFLA Metadata Newsletter reported that

'The comparative analysis of the literature on ethical values with the ICPs demonstrates some relationships ... However, it was also possible to perceive that some values ... were not addressed ... such as ethical responsibility, ethical sustainability, data protection and user privacy, ethical training, and intellectual property. This result encourages the

<sup>5</sup> <https://www.ifla.org/units/cataloguing/>



need for future research to evaluate the possibility of updating the ICP in order to include ethical values absent in the current guidelines.' ([Zafalon and Oliveira da Silva, 2024](#), p. 6)

This would seem to be a golden opportunity to use the Code – a product of the collective experience and wisdom of cataloguers from around the World - to plug an identified gap and inform the development of our international cataloguing principles.

### **The Codes' evolution – some personal observations**

What might we need to change in the next iteration of the Code?

The Codes' language has been noted as referencing Western systems of oppression e.g. a correspondent recently pointed out that the use of the term 'white supremacy' in the Codes' Scope section was too specific. History records that supremacist activities and characteristics are not confined to white colonialist movements and it was suggested that 'racial supremacy' would be a better phrase to use.

Feedback from Canada, Australia and South Africa confirms that the Code needs to reflect and represent diverse populations' values, customs and knowledge systems. However, there is a balance to be struck in keeping the Ethical Statements high level and therefore broadly applicable across our global community of practice whilst also acknowledging, respecting and reflecting individual nations traditional values, according to the CARE ([Carroll et al, 2020](#); [Global Indigenous Data Alliance, no date](#)) and OCAP ([First Nations Information Governance Centre, no date](#)) principles.

The Code does not acknowledge or mention the environmental costs and impacts of creating, sharing, enriching and preserving metadata. Can we condone the existence of so many metadata silos, and all of the energy and water resources required to create and maintain them, especially when there is so much duplication in and between them? This really is an area where all stakeholders in the metadata ecosystem should be considering closer collaborative efforts.

And finally, the Code does not explicitly mention AI (also a massive drain on environmental resources) but I would draw attention to Statement of Ethical Principle 5: *We support efforts to make standards and tools financially, intellectually, and technologically accessible to all cataloguers, and developed with evidence-based research and stakeholder input.*

AI is a powerful tool that can assist with many metadata tasks ([Lowagie, 2024](#)). But we must ensure that decisions regarding the use of current and future technologies pass the ethical tests explicit in the Code. In particular we should consider whether AI will ever be able to advance beyond processing metadata to be capable of applying the judgements that cataloguers use every day. E.g. [Fox \(2023\)](#) questions the ability of AI to apply the ethics of care, defined as valuing context, positionality, flexibility and ethical decision-making.

## Conclusion

The creation of the Cataloguing Code of Ethics was a fantastic community initiative but it was only the first attempt at codifying cataloguers' particular ethical responsibilities.

Now, four years on from that accomplishment, it is time for a review utilising the infrastructure of IFLA so that the process, and the revised document, can be owned and used by more of our international cataloguing community of practice.

In the meantime, CESC encourages you to take what you need from the Code and adapt it, factoring in the needs of your unique, particular and varied communities and cultures; and please share your experiences locally, regionally, nationally and internationally so that the Code can continue to evolve to support you and your communities.

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